



# FARMER'S REPORT

MARKET TRENDS | 11.28.2014

**US.**  
**FOODS**  
KEEPING KITCHENS COOKING.®

# MARKET HEADLINES

Markets are following seasonal trends with prices increasing in Beef, Produce, and Shell Eggs. Shell egg markets are feeling the impact of new regulations in the State of California as well as other factors. Ribeyes continue to increase in price due to normal seasonal demand. Grinds will stay relatively firm going into Christmas, but are expected to rise sharply after the holidays.

In Produce, adverse weather conditions have tightened supplies on tomatoes, cauliflower, red bell peppers, cucumbers, and limes. This has kept those markets high.

If you have not yet set your winter menu, now would be a good time to review your pricing and incorporate these market trends. Have you considered market pricing for some items...an easy to use tool, Menu ProfitBuilder Pro<sup>®</sup>, is available from your US Foods<sup>®</sup> rep.



## TENDERLOINS

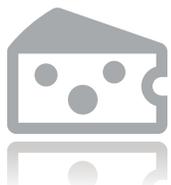
Tenderloins remain in demand with some potential for price increases in the next week or so. It looks as if select has already hit its peak. This is a great time for customers to discuss their holiday needs.

## RIBEYES

Ribeyes remain firm as buyers continue to secure product for the holidays. There is still some upside potential in pricing. Light ribeyes will command a premium due to heavier carcass weights. This is a great opportunity for customers to secure product and help offset some of the higher prices expected.

## GRINDS

Grinds are expected to rise sharply after Christmas. Demand is 15% above last year and trim supplies are at an all time low. Grinds will be heavily promoted after the holiday season.



## SHELL EGGS

Markets are at record levels and continuing to increase. Several factors are driving this increase. First, markets are showing the impact of the New Shell Egg Safety Regulations being put into place by the California Department of Food and Agriculture as of January 2015. Even though this only affects the sale of eggs in the state of California, these new regulations are drastically impacting the entire shell egg industry in the form of price increases and reduced supply. The main change is that the number of birds per cage needs to be cut in half. With half the birds producing eggs, overall supply declines. As California does not produce enough shell eggs now to meet their demand, shell egg facilities into the Midwest and further east are adjusting their caging systems to meet this additional demand.

Second, the market is feeling the impact of higher exports to Canada where demand has increased 76% over the prior year and December happens to be the highest month for exports. Additionally, breaking facilities are processing double the five year average amount of product due to higher demand. Lastly, per capita consumption of shell eggs was up about 3 eggs in 2013 and is expected to be up anywhere from 6-7 eggs this year. All of these factors are continuing to push up the market. The Urner Barry market is setting new record highs each week and further inflation is expected.



# BEEF

Live cattle traded at a record \$172 to \$173 in some areas last week. This is \$3 higher than the previous week. Packers are having difficulty finding buyers for product as shoppers start to concentrate on Turkey for Thanksgiving.

## ROUNDS

**INSIDES:** Rounds were higher again this week. There may be some near term strength, but they are expected to move a little lower before they reach bottom at the end or middle of December.

**FLATS:** Bottom round flats were quite a bit higher as packers alleviated inventories the previous week which left supply very low. There may be some near term strength, but we are still expecting them to move lower into December.

## LOINS

**STRIPS:** Choice strips were weaker with selects moving moderately higher. They are considered vulnerable to price fluctuations, but there is limited downside for the remainder of the year.

**TOP BUTTS:** Top butts did exactly the opposite of the previous week with Choice lower and select higher. We still may see some modest declines, but prices are expected to be firm in the winter as demand is relatively strong.

**BALL TIPS:** Ball tips were lower as they should be this time of year. We may see some near term price increases due to the Holiday reduced kill week, but there is more downside risk rather than upside moving into the winter.

**TENDERLOINS:** Tenders are in relatively good demand. They are expected to move higher into the Holiday season with peak prices occurring sometime at the end of November or beginning of December. Selects may be nearing their seasonal peak.

## RIBS

**RIBEYES:** All ribeyes were higher last week and it looks as if we may be seeing the peak of the season about 1-2 weeks early. However, there is still vulnerability in pricing over the next couple of weeks especially for sized product.

## CHUCKS

**CHUCK ROLLS:** Chucks were higher as packers sent product to the grinder to alleviate inventory. They are still vulnerable to the downside, but the low should be reached shortly.

## THIN MEATS & GRINDS

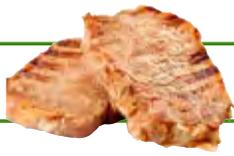
**FLAP MEAT:** Flap continue to oscillate up and down. You may see some higher prices the next couple of weeks due to higher live costs, but there is still risk to the downside.

**BRISKETS:** Briskets will remain strong even moving into the winter. Demand is outpacing supply at this time and with higher live costs, we don't foresee much relief anytime soon.

**GRINDS:** Grinds are firm for now, but they have some downside potential into December. Prices could escalate after the holidays.

**SKIRT MEAT:** Skirt pricing was unchanged and they remain vulnerable to price fluctuations.





# PORK

Base hog prices reported steady to slightly higher as buyers look to secure their needs and fill their post Thanksgiving schedules. Last week slaughter numbers were reported at 2.23 million head, down almost 5.0% from prior year. This week is a short week for packers, who will be dark on Thanksgiving. Slaughter numbers are expected to come in at 2.0 million head, almost 3% lower than year ago. Buyers are anticipating hog supplies to move higher week over week through the end of the year, but remain about 3% below 2013 levels.

Hog weights are steady but may move slightly lower due to colder than normal temperatures. Overall weights are running about 4 lbs above year ago levels and this is expected to continue through year end. Heavier animals may result in heavier pork carcass weights and, ultimately, larger pork cuts. Thus, availability of lighter or smaller “sized” items, like pork ribs may be in limited supply through early 2015.

On the demand side week over week, commodity cuts are starting to move higher in early week trade. Once packers are in a good inventory position (i.e., through the short slaughter week) prices are expected to gradually move higher through mid December due to increased retail pork promotions for the holiday season. This year, pork will be a low cost alternative to expensive beef items. On the processed meat side, bellies remain volatile through year end and hams were unexpectedly lower last week, but expected to move higher through mid/late December.

## LOINS

The market for bone in loins traded steady last week as supplies met current demand. Prices for boneless loins moved higher last week on increased retail demand. As the holiday season approaches, prices for both bone in and boneless loins are expected to firm and trend higher as retailers feature pork loins (in their December features) as a low cost alternative to higher priced beef items.

## TENDERS

Pork tenders held steady last week and are expected to move higher through late December as retailers plan to feature this item as a “value” for holiday promotions. Prices expected to remain above year ago levels through the December timeframe.

## BUTTS

Prices for pork butts traded higher last week on improved domestic and export demand. Prices are expected to trade steady to slightly higher through late December and perhaps into early 2015. Prices expected to remain above year ago levels.

## RIBS

Spareribs traded steady to slightly higher last week as supplies met weekly product demand. Prices are expected to gradually move higher through year end and into 2015. This is due to packers converting their larger spareribs into value added St Louis Ribs. This reduces the overall supply of light spareribs and firms up the pricing. Back Ribs were steady to slightly lower as packers struggled to move their existing inventories. Prices for Back Ribs are expected to trade steady to slightly higher through December. Lighter Spareribs, St. Louis ribs and Back ribs are expected to be in tight supply (due to heavier hog weights).

## BELLIES/BACON

Bacon/Belly prices moved lower last week, however the market remains volatile (week over week) as packers and processors adjust their fresh and frozen inventories. In addition, lackluster retail demand (for bacon) continues to support volatile markets. Prices are expected to remain volatile through late December then begin moving higher by early January 2015.

## HAMS

Ham prices traded lower last week as suppliers found themselves (temporarily) overstocked on fresh product. Ham prices are expected to gradually move higher through mid December as buyers book last minute holiday ham orders. Ham prices are expected to remain above year ago levels through year end.

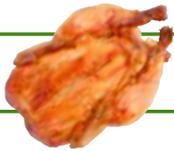
## TRIM

The following market dynamics will impact finished goods pricing during the December timeframe. Pork trimmings continue their seasonal downtrend and are expected to continue moving lower through the end of this year. Thus prices for processed meat items, like hot dogs and dinner sausage are expected to be lower during the December time frame.

## PICNICS

Pork Picnics held steady last week as current supplies met demand levels. Prices are expected to trade steady to slightly lower through year end. Prices may firm as sausage and hot dog makers begin freezing picnics for use in dinner sausage.





# TURKEY

## WHOLE FROZEN TURKEY

All of the Thanksgiving turkeys have been cleared out of the freezer storage areas. The industry spends this week balancing December holiday needs with remaining inventories.

## BONELESS SKINLESS TURKEY BREASTS

This market remains flat as further processors and Turkey slaughter slows for this week's big turkey day. Expect this market to start deflating heavily in December.



# POULTRY

With Thanksgiving this week, turkey is undoubtedly the bird that's on everyone's mind. Even with that said though, chicken is still found to be in a better position than most expected. Offerings are no worse than adequate to short depending on the supplier and item at hand. The call for wings and tenders is active. Sellers are holding product with increased confidence and attempting to ask for more money. Boneless breast meat is rated mostly steady. Trading levels are considered normal. Whole birds and WOGs are still finding support. According to sources, the call coming from buyers in the fast food and foodservice sectors is aggressive for post holiday business. Not much has changed for the back half of the bird. Supplies are deemed adequate for spot needs. Asked and paid prices are mostly market related for all dark bone-in and boneless lines.

Hatcheries in the United States weekly program set 214 million eggs in incubators during the week ending November 15, 2014, up 2 percent from a year ago. Hatcheries in the 19 State weekly program set 206 million eggs in incubators during the week ending November 15, 2014, up 2 percent from the year earlier. Average hatchability for chicks hatched during the week in the United States was 84 percent. Average hatchability is calculated by dividing chicks hatched during the week by eggs set three weeks earlier.

Broiler growers in the United States weekly program placed 168 million chicks for meat production during the week ending November 15, 2014, up 1 percent from a year ago. Broiler growers in the 19 State weekly program placed 162 million chicks for meat production during the week ending November 15, 2014, up 1 percent from the year earlier. Cumulative placements from December 29, 2013 through November 15, 2014 for the United States were 7.90 billion. Cumulative placements were up 1 percent from the same period a year earlier.

## BONELESS SKINLESS BREASTS

With the week of Thanksgiving upon us, plants closing for the holiday are balancing the short demand with a consistent demand. However, as next week approaches, the down production days may start to push this market up due to decreased supply.

## CHICKEN TENDERLOINS

The low price of tenderloins continues to drive further processors demand. With the week of Thanksgiving upon us, plants closing for the holiday is balancing the short demand with a consistent demand.

## WINGS

Wings are in demand this week, with supply barely covering demand. With the upcoming plant closures for Thanksgiving, expect to see some older wings on the market the first of the week at discounted prices, but then supply will start getting extremely tight.

## BONELESS SKINLESS THIGHS

The boneless thigh market remained flat this week as further processors continue to drive this market. This market has seen prices well supported throughout the week and into Thanksgiving. December will see a slight softening to the market.



# COMMODITY GROCERY

## SOYBEAN OIL

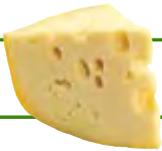
**CROP:** U.S. soybean ending stocks are expected to increase substantially in the 2014/2015 crop year from a record low of 92 million bushel in 2013/2014 to somewhere north of 400 million. The U.S. soybean harvest is nearly complete now and the pipeline has finally been refilled with solid crusher ownership. Soy oil yield reports are coming in slightly lower than last year at 11.4 vs. 11.7 Lbs per bushel.

**ISSUES:** Processors continue to struggle to find empty cars. Supply is going to remain tight in the short term – oil supply has slightly increased up from 937M lbs to 1.064 B lbs.

**USDA:** USDA announced the sale of 235,000mt of soybeans to China and also 174,000mt of soy meal to Thailand.

**WORLD NEWS:** South American weather appears near ideal. Forecasts, if true, should improve crop conditions for both the Brazilian and Argentine row crops. Brazil soybean planting continues to surge ahead and was reported 74% complete versus 81% on average. Brazil is expected to have a bumper crop. Argentine sources report planting 36% complete versus 44% last year.

**BIODIESEL:** We finally received an announcement from the EPA on biodiesel mandates, if you want to call it that. They have decided to postpone a decision for 2014, 2015 and 2016 until “sometime in 2015”. The soybean oil market had poked above \$.3300 on anticipation of an increase in the mandate and the return of the \$1 per gallon blender’s credit but faded quickly after the “release.”



## DAIRY

### BUTTER

The butter market is slightly up as holiday orders are wrapping up, but cream availability is tightening up as other holiday favorites increase demand. Further deflation is expected, but it may be January before it is realized.

### CHEESE

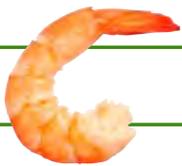
Cheese markets are following normal seasonal declines. Markets are expected to trade within the current range for the remainder of 2014 with a possible tick upward in December due to lower cold storage numbers.

### SHELL EGGS

Markets are up again on all sizes. The Urner Barry Market continues setting record highs with each daily close. Supplies are tight on all sizes and demand is high.

### MILK & CREAM

For the month of November, Class II butterfat prices decreased by double digits. Just in time for the holiday season, items that have high butterfat content will have decreases, specifically, whipping cream, half and half, and heavy cream. Butterfat pricing should continue to decline in December.



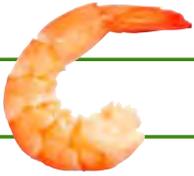
## SEAFOOD

### SHRIMP, DOMESTIC (WHITES AND BROWNS)

The Brown shrimp season is done and prices are now stable. The White shrimp market is still going strong. Weather patterns in the Gulf has pushed shrimp out of shallow water. We are hearing with the moving to deeper water the white season may be coming to its end.

**DOMESTIC PUDS:** The catch of small shrimp was really good this past weekend with the cold weather that moved into the gulf. As a result processors were able to have a good pack week. One would think we would see a price drop but orders have been steady so packers are holding prices. We may have seen the bottom but we will know more next week after all shrimp are packed this weekend and orders are filled.





# SEAFOOD (CONT'D)

## SHRIMP, IMPORTED

### (BLACK TIGER AND WHITES)

**TIGER:** The HLSO market is stable with signs of lower pricing. Inventory is slowly moving and vendors are looking to move product. Retail commitments are filled. We still feel Tigers overall will be tight supply as we've been recommending, conversion to whites remains a sound strategy, as the market will now dictate large gaps in pricing between the Tigers & Whites.

**WHITES:** The Asian and Latin markets have shown their first signs of weakening. We are not sure how long this trend will last. There is still concern once China starts to buy that prices will move up. Europe markets are slowing down and are helping to unsettle the market. EZ Peel White prices are starting to drop.

## CATFISH, DOMESTIC & IMPORTED

**DOMESTIC:** The domestic catfish was weaker this week due to lack of sales for the Thanksgiving Holiday. We feel this is a false low and is just movement driven.

**IMPORTED:** The market is starting to see some upward movement this week as product is getting tighter. Inventories in the US are getting tighter, and in some cases not available. This is a result of the spring harvest that was considerably lower than LY. The outcome of the fall harvest will set pricing that will take us into December.

## SALMON

**CHILEAN FARMED SALMON:** The Chilean frozen fillet market remains unsettled. Mostly lower offerings are noted on all sizes. There does not seem to be an issue with inventory and all sizes of filets are in good supply. The Chilean fresh fillet market saw some weakening this week on lack of sales. Whole Fresh fish are holding steady.

**WILD ALASKAN SALMON:** The net king market trended lower and a few still lower offerings are noted. Supplies of net kings are fully adequate for a lackluster demand. The troll king market is unchanged along with the Sockeye, Chum, and Coho markets.

## MAHI MAHI

The catch has been good with mostly smaller fish being caught (1-3# loins). The thought is there is still a lot of fish to come out of the water and pricing could go lower in December. This is a wait and see market at this time.

## SCALLOPS

**SEA:** Prices are starting to rise. We feel as fishermen use up their quota, prices will continue to rise as product becomes short in the market.

**BAY:** Pricing remains unchanged this week.

## TILAPIA

Pricing was weaker this week on Tilapia, we feel this trend will not last and prices will move up as inventories get tighter and the New Year approaches.

## WHITEFISH COMPLEX

### (COD, POLLOCK, HADDOCK)

**COD:** The market for Atlantic Cod is on the rise, Pacific Cod is showing signs of higher prices with new season 3-4 months away and Atlantic Cod being high.

**POLLOCK:** The market remains stable on both domestic and imported Pollock fillets.

**HADDOCK:** Pricing is on the rise and inventories are short.

## KING CRAB

**RED & GOLDEN:** Alaska has called for a ban on Russian seafood imports in retaliation for Russia's ban on US food shipments. Despite the justice of this, it may be a case of be careful what you wish for. For King crab, a shutdown of Russian product - which supplies about 90% of the US demand - would destroy the market. After years in which the Deadliest Catch gave a huge boost to crab consumption, nothing would make consumers madder than boosting a product that is unavailable. No retailer or restaurant wants to put themselves in that position of making their customers mad - so there would be a massive migration away from King Crab.

## TUNA, YELLOWFIN

### (FROZEN STEAKS & LOINS)

The market rallied due to higher replacement costs and thinning inventories in the U.S. The undertone is full steady.

## CRABMEAT

### (BLUE & RED, PASTEURIZED)

Both Blue and Red markets are stable this week. Blue Swimming crab meat seems to be in better shape as the pipe line is filling up. Red Crab production has started and we feel as product hits the US in 60 days we may see some weakening in price.

## SNOW CRAB

**CANADA:** Pricing remained steady this week. Supplies are adequate to barely adequate for active demand. Larger Canadian clusters 10 and 12ups are starting to get tight on supply. Retail has stepped in on the Canadian Crab market and starting to make purchases for Holiday ads.

**ALASKA:** The market was stable this week with quiet demand. There may be a bit of discounting on the horizon as traders look to convert inventory to cash so they can participate in the King markets.

## LOBSTER TAILS

**WARM WATER:** Brazil is steady to firm with a few lower offerings noted on 4 and 5 oz. tails. Production has been relatively slow. As North American Lobster prices and inventories become tight look at Warm Water Lobster Tails as a great item to move to with lower costs.

**NORTH AMERICAN LOBSTER:** Pricing is now stable at high levels. Inventories are tight on most sizes. Market outlook continues to be expensive until after the New Year. Lobster meat is also firm.

# PRODUCE

## VEGETABLES



### POTATOES

**Russets:** Prices continue to increase slightly on the larger sized Idaho Russets while the smaller cartons remain steady. Due to the increased demand and limited availability of larger sizes, it is recommended to place orders as early as possible. The market remains steady for non-Idaho russets. Transportation is still a major concern in all areas as the Christmas tree market continues to drive up freight costs and limits the availability of trucks. Poor weather conditions are also causing delays, so it is recommended that orders be placed early.

**Reds:** The market remains steady for red potatoes from all growing regions. It is expected that there will be very little change in FOB pricing for the rest of the year. Freight continues to be a concern and is drastically affecting the delivered prices.

**Sweet Potatoes:** The sweet potato harvest is now complete in the south. The quality is very good and yields are strong.

**Yellow Potatoes:** Demand for yellow potatoes has decreased some with the demand on Russets increasing for the holidays. The market remains steady, and should continue to do so for the rest of the year.



### GARLIC

No changes this week for Chinese Peeled Garlic. Pricing is expected to continue to hold in the current range. Some lower prices are being reported out of Los Angeles on Chinese Peeled. Argentine Off-Grade Garlic will start arriving next week into the US.



### CABBAGE

Market on cabbage is steady this week with good supply and moderate demand out of California. Quality is good. Lighter supply is expected in the coming weeks.



### LEAF LETTUCE

Similar to Iceberg, there is an abundance of Romaine available and very little demand. Markets are decreasing.



### ICEBERG LETTUCE

Now that harvesting in Yuma is in full swing, we are seeing ample supplies of iceberg. Demand has dropped significantly causing a surplus of supplies. FOB prices are down.



### ONIONS

Demand is moderate at best on all colors and sizes which is keeping the onion market steady. Growers have finished harvesting their onions for the season. Quality is good out of all areas.



### CHILE PEPPERS

Market is up steady this week on Chile peppers with moderate supply and demand. Good supply and quality is expected in the coming weeks.



### CUCUMBERS

The east coast is seeing steady to weaker markets with good quality overall. The west coast is seeing a wide range of quality.



### SQUASH

Squash is still limited for all varieties on both coasts. We continue to see fair quality due to the scarring caused by the rain and wind. The market on the east remains steady, but it has increased on the west coast. Relief is expected around the 1st or 2nd week of December when additional product starts crossing from Mexico.



### TOMATOES

**Rounds:** Supplies are still extremely tight on both coasts. With the cold weather and rain on the east and delayed plantings on the west, we continue to face a gap situation. Product from the east is running extremely small and will come in at the minimum size requirements for specifications. Pricing on rounds are up for both coasts. It is expected that the East will remain consistently high through the middle of December. The west coast will see prices level out around mid-January once Mexico's harvest is in full swing.

**Cherry and Grape:** As with Rounds and Romas, there is limited availability of cherry and grape tomatoes throughout. Cherries are nonexistent in the west and very little can be sourced from the east. The market remains steady because there is very little demand. Grapes will most likely be the first variety to see any relief once harvesting is in full swing in Mexico, which should be about mid-December.

**Romas:** The gap situation is even worse for the Roma tomatoes. This variety is very tight to nonexistent for growers on the east and west coasts. It will be several weeks until we see any relief.

# PRODUCE



## GREEN BEANS

The bushel market is up this week on green beans with light supply and good demand. Light supplies are expected through into mid-December.



## EGGPLANT

The eggplant market is starting to improve now that volume from Mexico continues to increase. The west coast is seeing a weaker FOB, while the east is steady to weaker depending on grade.



## BELL PEPPERS

There are ample supplies of green bell peppers all around. Pricing is steady on the east coast, while the west is already down by several dollars as there is good volume crossing from Mexico. Colored bells continue to be extremely tight with very high markets. Relief for red bell peppers is expected around mid-December.



## CARROTS

The market is up this week on Jumbo carrots as Bakersfield is tight on supplies. Quality continues to be good.



## CELERY

Market on celery is steady this week with steady supply, demand and good quality and color. There have been reports of some small sizing.



## GREEN ONIONS

Green onion market is steady this week with moderate demand and a wide range in quality. Supplies have picked up out of Mexico. Best availability continues to be in the smaller sizing.



## CAULIFLOWER

The market on cauliflower is up this week with very light supplies as Salinas will be finishing up and supplies from Yuma will be very light. The markets are expected to remain very strong for the next 2 weeks. Quality from both areas is good.



## ASPARAGUS

Market is down this week on asparagus with good supply and lighter demand. Mexico production is steady. Production out of Peru is moderate.



## BROCCOLI

Market is down this week on crowns and bunches. Good supplies and quality this week with moderate demand.

# TROPICAL



## PINEAPPLES

The market is steady and supplies are increasing weekly. Quality is fair at best but is expected to improve in coming weeks.



## BANANAS

The rainy season in the tropics has begun. Export numbers have increased and prices are steady. Organic numbers have become unexpectedly short.



## AVOCADOS

Mexican production is good with volume stabilizing as we get into a normal flow of fruit. There is very good demand and the market has firmed up on 60's and smaller sizes with this demand. The new Crop will take longer to ripen, and has a tendency to remain green when ripe and ready to eat and also has a thicker skin making it difficult to detect the degree of ripeness.

# MELONS



## CANTALOUPE

The market is steady. The desert has increased in volume but is peaking on large fruit such as the 9's and 6's. Demand has slowed down due to the recent higher prices. Quality is being reported as fair to good on the new desert crop.



## HONEYDEWS

Mexico and the desert have started and are heavy towards 4's, 5's and 6's. The market is steady on all sizes and quality is fair to good.

# PRODUCE

## BERRIES



### BLACKBERRIES

Production continues to decline out of California and quality remains an issue with red cell, soft and overripe fruit. Expect continued fill-rates and possible loading delays.



### STRAWBERRIES

Quality and harvest numbers coming out of the Salinas/Watsonville are down. Very little is being packed for the fresh market. Demand has picked up which has firmed the market. The rain only hit the Salinas/Watsonville area. Berry sizing is small, in the mid-upper 20's count range. Oxnard and Santa Maria districts are all reporting improved quality as evening temperatures have begun to fall into ideal ranges of high 40's and low 50's. Sizing is ranging smaller.



### RASPBERRIES

California growing regions continue to decline in volume. Although quality is an issue, volume is increasing from Mexico.



### GRAPES

The red seedless market is steady. The green seedless market continues to strengthen as the fresh harvest rapidly winds down. Peruvian grapes (Sugarones) are currently on the water but projected availability is December 1.



### BLUEBERRIES

Domestic blueberry crop is done for the season. Offshore product is available from Central America and Central Mexico. Availability is volatile depending on where product is loading as product is being transferred daily to meet order requirements. Quality is fair for the off-shore berries.



## HANGING FRUIT

### APPLES & PEARS

Apple markets are steady. Small size fruit is limited for all varieties in New York. Michigan has better availability of smaller fruit but is producing more of the US extra-fancy grade right now. California is packing a light volume of Granny-Smiths. New crop red delicious is peaking on 80/88's in the #1 and premium grades. Small size reds remain short. Washington Gala's are steady to lower. Honeycrisp are available in Washington. Washington Bartlett pears are steady. Washington D'Anjou pears are also steady. Washington red pears are mostly steady on all sizes.

## CITRUS

### LEMONS

The market is easing as we are seeing increasing supplies out of the desert regions. Better quality is being reported and sizing is peaking on 140's 115's and 165s.



### ORANGES

Navel production continues. Internal maturity on the navels is ahead of normal. Size is currently peaking on 88's, 113's, 72's, 138's and 56's.



### LIMES

Holiday demand has been good and the traditional winter market rise has begun in the lime industry. Smaller sizes are fetching a slight premium versus extremely large fruit. 175's and 200's are staying in good quality and steady availability despite their relative tightness.

